



CITY OF LODI COUNCIL COMMUNICATION

AGENDA TITLE: Approve Measure K Renewal Final Draft Expenditure Plan and endorse the renewal of Measure K

MEETING DATE: June 7, 2006

PREPARED BY: City Manager

RECOMMENDED ACTION: Approve San Joaquin Council of Governments' Measure K Renewal Expenditure Plan and endorse the renewal of Measure K.

BACKGROUND INFORMATION: The San Joaquin Council of Governments Board of Directors at their April 27, 2006 meeting, approved on a 12-0 vote, the attached Measure K Renewal Expenditure Plan. The Plan needs to be approved by the County Board of Supervisors (achieved on May 23, 2006) and a majority of the cities representing a majority of the incorporated population if the Measure K renewal is to be placed on the November 2006 ballot. As of May 31, 2006, the cities of Stockton, Escalon, Ripon and Lathrop have unanimously approved the attached Expenditure Plan achieving the minimum number of cities needed to approve the Measure K Renewal Expenditure Plan. The San Joaquin Council of Governments is requesting the Lodi City Council approve the Measure K Renewal Expenditure Plan as well.

In March, the Lodi City Council provided comments to the staff of San Joaquin COG on potential changes the Council would like to see in the draft plan. A summary of those comments and the response from the San Joaquin Council of Governments is outlined below:

1. Route 12 Improvements between Lower Sacramento Road and I-5 should be added to the State Highway Improvement subcategory of the Congestion Relief Category. "Exchanging" this project for the "Route 12 Improvements West of I-5" project is acceptable. Move the Route 12/99 Interchange project from Congestion Relief Local Roadway subcategory to the State Highway category.

The Final Expenditure Plan incorporates the improvement of Route 12 between Lower Sacramento Road and I-5.

2. Down-scope the Highway 99/Turner Road interchange project from "reconstruct interchange" to "capacity, signalization and safety improvements".

The Final Expenditure Plan incorporates this change.

3. Change the scope and limits of the Victor Road widening project from Cluff Avenue to Eastern General Plan boundary and include "capacity, signalization and safety improvements at Highway 99".

The Final Expenditure Plan incorporates this change.

4. Delete the Central Avenue project from the Congestion Relief category. **The Final Expenditure Plan incorporates this change.**

APPROVED:

A handwritten signature in black ink, appearing to read "Blair King".

Blair King, City Manager

5. Increasing the minimum to an agency in the Local Street Repair category from the proposed \$250,000 minimum to \$300,000 is acceptable. Any additional increase to the minimum should be phased in over the life of the program. **The distribution formula in the Final Expenditure Plan incorporates the \$300,000 annual minimum.**

The SJCOG Board also made additional changes to the Expenditure Plan based on comments from other organizations. A summary of those changes includes:

- Modifying the membership of the Management and Finance Committee to include transit representation
- Adding language to encourage expressways as a possible substitution for mainline freeway widening
- Adding a bridge across the Stanislaus River in the Ripon area
- Recognizing transit investments in service to Modesto from Escalon and Ripon
- Adding a Smart Growth Incentive program to the Measure K program
- Modifying the description of the Port Access project to identify a western extension of the Stockton Crosstown Freeway as being eligible.

The Measure K Renewal Expenditure Plan is in final form now and can not be altered without having to go back through the process of having the SJCOG adopt the Expenditure Plan again and then taking it back to the County and the cities. This would likely make it difficult to make all the deadlines for the November election. SJCOG is therefore asking the City Council to approve the Expenditure Plan with no changes.

Measure K was originally approved by the voters in November of 1990. The renewal requires a 2/3 vote for passage. The time is now appropriate for the Council to endorse the renewal of Measure K if it desires to do so.

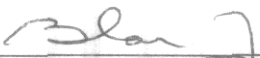
FISCAL IMPACT: Measure K has funded a variety of projects in Lodi including:

- Lower Sacramento Road widening
- The Multi-modal Station
- The railroad rail line relocation project
- Street maintenance

If Measure K is renewed, Lodi can expect to receive no less than \$300,000 annually for street repair. Route 12 improvements from 99 through Lodi to I-5 and beyond to Bouldin Island have been identified for funding. Funding for improvements to Pine Street, Victor Road, Hutchins Street, Harney Lane, Ham Lane, and Route 99 interchanges have been included.

If Measure K is not renewed, revenues to fund the above projects and repair will not be available.

FUNDING AVAILABLE: Not applicable.



Blair King, City Manager

Attachment

cc: Andy Chesley, Director, Council of Governments

MEASURE K RENEWAL

SAN JOAQUIN COUNTY TRANSPORTATION IMPROVEMENT PLAN

APRIL 27, 2006



SAN JOAQUIN COUNCIL OF GOVERNMENTS



Measure K Expenditure Plan

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SAN JOAQUIN COUNTY LOCAL TRANSPORTATION IMPROVEMENT PLAN

EXPENDITURE PLAN

This document contains the Expenditure Plan of the San Joaquin County Local Transportation Improvement Plan. This Expenditure Plan, which is required to be adopted by the San Joaquin County Transportation Authority pursuant to Public Utilities Code commencing with Section 180000, is the legal document implementing the local retail transactions and use tax and specifying the method of allocation of the local retail transactions and use tax revenues and other requirements of the Measure. The Ordinance becomes effective at the close of the polls on the day of the election at which the local transportation measure is approved by the voters. The full text of the Expenditure Plan is provided on the following pages.

Member Jurisdictions

City of Escalon
City of Lathrop
City of Lodi
City of Manteca
City of Ripon
City of Stockton
City of Tracy
County of San Joaquin

EXECUTIVE SUMMARY

The Transportation Improvement Plan is aimed at remedying the existing over \$7.0 billion deficiency in transportation funding in San Joaquin County while promoting improved air quality. It also mandates local development fees and regional growth coordination. The Plan calls for street repairs, safety and operational improvements on local streets and roads, projects to reduce congestion on streets and highways, passenger rail and bus service to provide alternatives to the car and improve the air quality of the San Joaquin Valley, and separation of streets from railroads at designated crossings to improve safety.

Revenue to fund the Plan comes from the continuation of the existing one half percent (1/2 %) sales tax and will be limited to a 30-year period. The measure is estimated to generate \$2.552 billion for programs.

Categorical Allocations are as follows:

- 35% or \$883 million to Local Street Repairs and Roadway Safety
 - 86% or \$759 million for local street repairs
 - 14% or \$124 million for roadway safety
- 32.5% or \$820 million to Congestion Relief Projects
- 2.5% or \$63 million for Railroad Crossing Safety projects
- 30% or \$756 million to Passenger Rail, Bus and Bicycles:
 - 39% or \$295 million to passenger rail transit
 - 49% or \$370 million for bus transit
 - 5% or \$38 million for bus rapid transit capital
 - 7% or \$53 million for bicycles, pedestrians, and safe routes to school

By law, the Local Transportation Authority (LTA) can take no more than one percent (1%) of gross revenues for administrative salaries and benefits.

CATEGORY DESCRIPTIONS

LOCAL STREET REPAIR AND ROADWAY SAFETY - These funds are apportioned according to a baseline allocation and the annual increase of sales tax revenue over the baseline allocation. The baseline allocation is the highest annual total of Local Street Repair funding collected in either 2008, 2009, or 2010 divided 50% to San Joaquin County, 50% to the incorporated cities. Individual city allocations are by their proportionate share of the total incorporated population. The baseline allocation will be increased annually for inflation by 3% or the actual annual growth in sales tax revenue if the actual annual sales tax growth rate is below 3%. The increase over baseline allocation will be divided between all jurisdictions by population percentage of the total incorporated and unincorporated population. The County of San Joaquin is guaranteed an annual minimum of 40% of the combined Local Street Repair and Roadway Safety funding. An annual minimum of \$300,000 is guaranteed to all jurisdictions. This formula will be reviewed and, if necessary, revised after fifteen years. These funds must be used to augment current transportation spending and cannot be used to replace general fund expenditures.

- **Local Street Repair** includes expenditures to rehabilitate local streets, curbs, gutters, sidewalks, and roadway shoulders.

- **Roadway Safety** promotes motorist safety including fog reflectors, median barriers, roadway shoulders, emergency vehicle traffic signal pre-emption systems, and safe routes to schools.

CONGESTION RELIEF PROJECTS – These are projects of regional importance, which add lanes to roadways or provide operational improvements that increase roadway capacity. Projects include state highway facilities and regional arterial facilities. Funding will be used in combination with other revenue sources such as state funds or local fees to deliver projects and can be loaned to the state to deliver a project sooner than would normally be expected through the State Transportation Improvement Program (STIP) process. Sixty percent (60%) of the funds are dedicated to state highway projects. Forty percent (40%) of the funds are dedicated to regional arterial projects according to the population of local jurisdictions.

PASSENGER RAIL, BUS AND BICYCLES - It is the intent to use sales tax revenue to match and supplement state and federal funds for passenger rail transit, bus transit, and pedestrian/bicycle facilities.

- **Passenger Rail Transit** includes expenditures to promote and upgrade passenger rail service in the Stockton - Bay Area corridor over the Altamont and the Modesto - Stockton - Sacramento corridor. Eligible costs include but are not limited to operations, locomotives and passenger cars, track improvements, train and grade crossing controls.
- **Bus Transit** promotes bus service between the cities within San Joaquin County for all trip purposes. Expenses for capital such as vehicles and operations are eligible. Funding is used for bus programs to promote peak hour, commute service as well as bus services for the elderly and persons with disabilities. These funds can be used for park and ride lots, express bus service, greater frequencies on existing peak hour routes, trip reduction programs to new employment centers and service to other counties. The San Joaquin Regional Transit District (SJRTD) is to receive a minimum allocation of 50% for programs in this category.
- **Bus Rapid Transit Capital** provides funding specifically for infrastructure to support Bus Rapid Transit service. Bus Rapid Transit provides express bus service with fewer stops and higher frequencies that are similar to light rail. Bus Rapid Transit requires priority to be given to buses through traffic signal priority and could allow buses to run on designated high occupancy roadway lanes or separate lanes, including off roadway corridors. Bus Rapid Transit can include interregional/intra-city commute, inter-city, and elderly/persons with disabilities bus service.
- **Bicycles, Pedestrians, and Safe Routes to School** promotes pedestrian/bicycle facility projects including commute facilities, recreational facilities, cross walks, traffic calming projects, and safe routes to schools.

RAILROAD CROSSING SAFETY PROJECTS – These are projects to provide motorist safety at railroad crossings. Projects include grade separation facilities, meant to separate roadways from railroads, as well as at-grade improvements. A list of potential underpasses or overpasses of railroad tracks on local streets and roads throughout San Joaquin County has been presented. The Authority will adopt criteria to prioritize the listing.

SAN JOAQUIN COUNTY TRANSPORTATION AUTHORITY

The San Joaquin Council of Governments is designated the San Joaquin County Local Transportation Authority, pursuant to the provisions of Public Utilities Code Section I, Division 19 commencing with Section 180000. The Local Transportation Authority was created by the San Joaquin County Board of Supervisors to carry out the activity delineated in the San Joaquin County Local Transportation Improvement Plan.

SJCOG Board Members

Fiscal Year 2005-06

Councilman Gary L. Haskin, Chair - City of Escalon
Councilman John W. Harris, Vice Chair - City of Manteca
Supervisor Jack Sieglock - San Joaquin County
Mayor Gloryanna Rhodes - City of Lathrop
Mayor Dan Bilbrey - City of Tracy
Vice Mayor Gary Giovanetti - City of Stockton
Councilman Larry Hansen - City of Lodi
Supervisor Victor Mow - San Joaquin County
Mayor Ed Chavez - City of Stockton
Mayor Chuck Winn - City of Ripon
Supervisor Leroy Ornellas – San Joaquin County
Councilman Dan Chapman – City of Stockton

Ex-Officio Members

Jane Perez - Caltrans District 10
Ron Coale - Port of Stockton
Duane Isetti- San Joaquin Regional Transit District

STATEMENT OF PRINCIPLES

The San Joaquin Council of Governments (SJCOC) is designated as the Local Transportation Authority (LTA) for the county under the provisions contained in SB 142 (Chapter 786, Statutes of 1987) in order to carry out the activities described in this Expenditure Plan. The Plan was prepared by the San Joaquin Council of Governments in concert with community leaders, elected officials, management and technical staff from member cities and the County and interested members of the general public. The Local Transportation Authority's principles are as follows:

1. A balanced transportation network of highways, local streets, rail and bus transit and regional planning is necessary to preserve the quality of life and a healthy viable economy for San Joaquin County residents.
2. Improved air quality is an important goal for San Joaquin County as well as the entire San Joaquin Valley. Alternatives to the single occupant automobile are important contributors to improved air quality. The implementation of this Plan must be consistent with the adopted Air Quality Plan for San Joaquin County and the San Joaquin Valley Air Basin.
3. It is estimated that there is currently a need for over \$7.0 billion to fund:
 - Street repair, safety and improvements on local streets and roads;
 - Congestion relief projects to accommodate existing crowding of streets and highways;
 - Capital and operating assistance for passenger rail and bus service;
 - Local match requirements for state and federal funding.
4. State and Federal monies are insufficient to meet San Joaquin County's transportation needs. A local retail transactions and use tax for transportation improvements has been demonstrated to be the funding method best suited to match other revenue sources to meet San Joaquin County's needs.
5. All investments in capital facilities and improvements will look at alternatives to widening freeways that provide more cost effective solutions for intra-county transportation and must be within San Joaquin County or directly service the interests of San Joaquin County residents.
6. In order to accommodate San Joaquin County population growth so that it does not occur at the expense of current residents, the cities and the county in San Joaquin will maintain and collect both local traffic mitigation fees and a regional transportation impact fee to pay for growth-induced transportation facilities.
7. To receive Local Street Repair and Roadway Safety funding the cities and the county in San Joaquin must have adopted both local traffic mitigation fees and a regional transportation impact fee.
8. To implement the Plan, management, technical and most importantly citizen oversight is essential.

SMART GROWTH INCENTIVE PROGRAM

A minimum of \$65 million in federal transportation funding or Measure K funding will be made available during the life of the Measure K Renewal program for smart growth incentives to local jurisdictions in San Joaquin County. These funds will be available for infrastructure improvements that will assist local agencies in better integrating transportation and land use, such as street calming, walkable community projects, transit amenities and alternative modes of transportation. These funds will be available to enhance infill development, neighborhood revitalization and downtown improvements.

CATEGORICAL ALLOCATIONS

The proceeds collected from the sales tax authorized by the San Joaquin County Local Transportation Improvement Plan shall be allocated to eligible projects based on the formula provided in Table 1.

TABLE 1

ANTICIPATED SAN JOAQUIN COUNTY THIRTY YEAR REVENUE FROM A ½ % SALES TAX FOR CATEGORICAL ALLOCATIONS

Thirty Year Revenue Total in 2005 Dollars: \$2,522,000,000

CATEGORICAL ALLOCATIONS (30-Year Estimate in 2005 Dollars)

NET FOR ALLOCATION			\$2,522,000,000
LOCAL STREET REPAIR AND ROADWAY SAFETY			35%
			\$883,000,000
Local Street Repair	86%	\$759,000,000	
Roadway Safety	14%	\$124,000,000	
CONGESTION RELIEF PROJECTS			32.5%
			\$820,000,000
PASSENGER RAIL, BUS AND BICYCLES			30%
			\$756,000,000
Passenger Rail Transit	39%	\$295,000,000	
Bus Transit	49%	\$370,000,000	
Bus Rapid Transit Capital	5%	\$38,000,000	
Bicycles, Pedestrians, and Safe Routes to Schools	7%	\$53,000,000	
RAILROAD CROSSING SAFETY IMPROVEMENTS			2.5%
			\$63,000,000

These revenue allocations are for illustrative purposes and are estimates only. Actual allocations to each category will be based on the percentages listed above.

CATEGORY DESCRIPTIONS

CONGESTION RELIEF IMPROVEMENTS

Thirty-two and one-half percent (32.5%) of the net revenue generated under this measure will be allocated to regional capacity improvement projects. For the purposes of this Plan, "capacity improvement projects" are those capital projects which add lanes to roadways, improve traffic operations, or expand transit capabilities. The cost of these congestion relief projects can include such items as traffic signals, channelization, curbs and gutters, shoulders, bus rapid transit infrastructure, capital improvements at the Stockton Metropolitan Airport, project development, etc. as long as these costs are directly related to the project.

STATE HIGHWAY PROJECTS

Many more state highway improvement projects are needed to address the congestion and safety problems than existing state and federal revenues can fund. Of the total funds available in the Congestion Relief Category, sixty percent (60%) of the funds will be used to match federal and state revenues to complete projects of benefit to the state highway system including, but not limited to:

Interstate 205

Widen from 6 to 8 lanes between I-580 and I-5

Interstate 5

Widen from 6 to 8 through lanes between I-205 and Eight Mile Road

Route 4 (Crosstown Freeway)

Improve interchanges with I-5 and Route 99

Route 12

Widen from 4 to 6 lanes between Lower Sacramento Road and Route 99, widen from 2 to 4 lanes between Lower Sacramento Road and I-5, provide safety and operational improvements between I-5 and Bouldin Island, and reconstruct the Route 99/Route 12 West Interchange

Route 12 / Route 88

Widen from 2 to 4 lanes within the joint Route 88/Route 12 corridor

Route 99

Widen from 4 to 6 lanes between Route 120 and Route 4 (Crosstown Freeway)

Route 120

Widen from 4 to 6 lanes between I-5 and Route 99

Highway Access to the Port of Stockton

Improve access to the Port of Stockton from I-5 while enhancing the Boggs Tract community by extending the Stockton Crosstown Freeway to the west from its terminus at Fresno Avenue to the Port of Stockton

Interstate 205 Parallel Rail Freight Shuttle

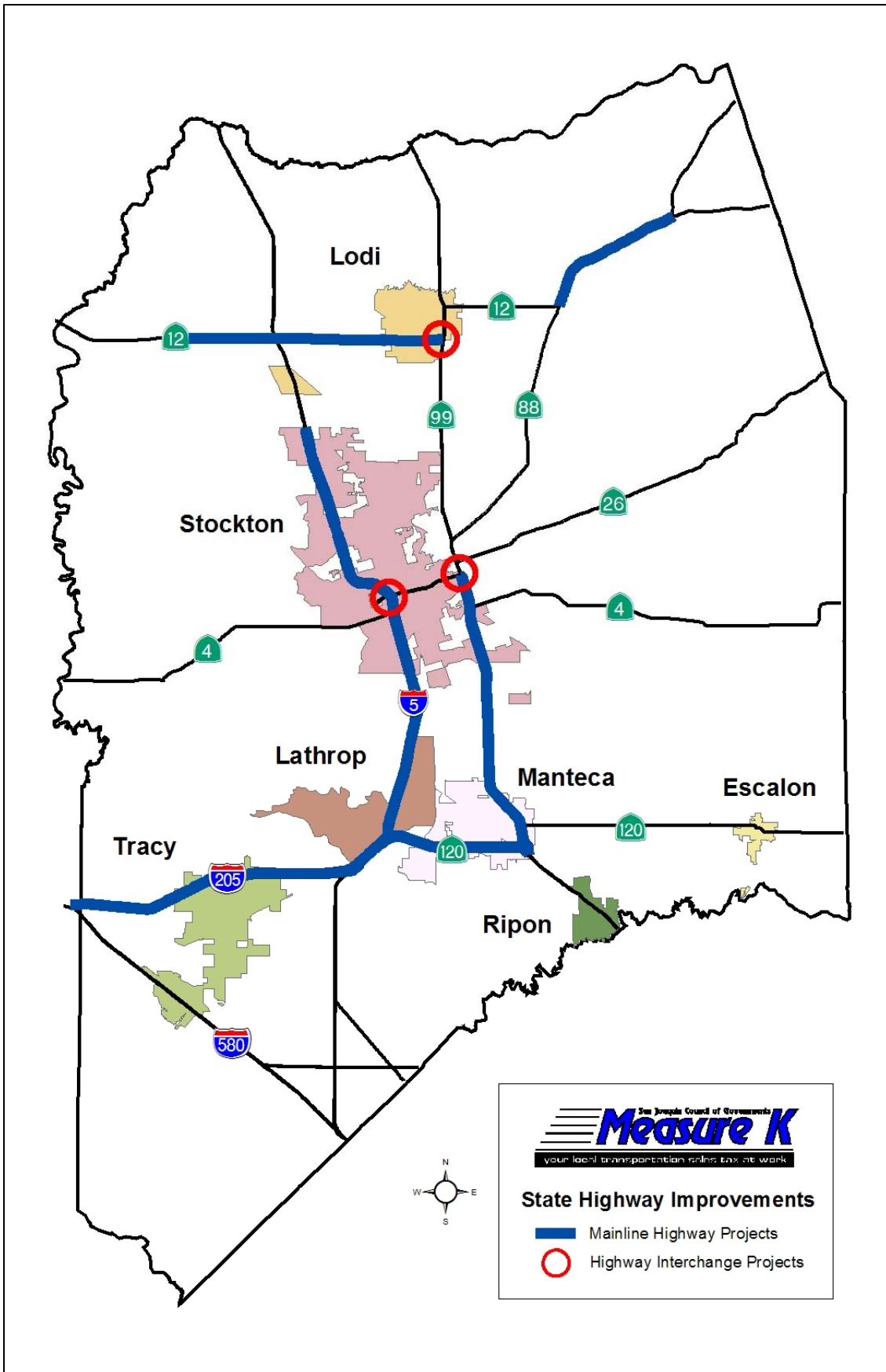
Implement rail freight shuttle between the Port of Stockton and Port of Oakland to divert truck freight traffic from the I-205 corridor

Stanislaus River Crossing

Construct a new bridge across the Stanislaus River parallel to Route 99 in the Ripon Area

Freeway Service Patrol

Provide motorist assistance on priority state highways to reduce congestion caused by disabled vehicles



REGIONAL ARTERIAL PROJECTS

Forty percent (40%) of the Congestion Relief Category funding may be used to match state and local revenues as well as regional transportation impact fee funding to provide capacity improvements to regional arterials in each of the cities and County of San Joaquin. These funds are apportioned to the local jurisdictions according to their proportionate share of the total incorporated and unincorporated population. The local jurisdictions will identify and prioritize projects for funding requests to the Authority. The Authority will allocate funds consistent with the Regional Transportation Plan. Projects that have an approved Project Study Report, or equivalent, and are included in the Regional Transportation Plan will receive an allocation approval automatically from the Authority in the first ten years of the program (2011 to 2021) so long as the allocation does not exceed the total Congestion Relief funds available to that jurisdiction over the life of the Measure K program. Should revenue projections show an increase in funding in the program, jurisdictions can seek an additional allocation for a project even if it has already received a previous allocation. Eligible projects include, but are not limited to:

Escalon Planning Area:

Campbell Road Extension

Construct 2-lane extension of Campbell Road between Sante Fe Avenue and Rt. 120.

Ullrey Avenue / McHenry Avenue Intersection

Reconstruct intersection of Ullrey Avenue and McHenry Avenue including addition of turn pockets, improvement of traffic signal and installation of train pre-emption system for UPRR railroad crossing.

California Street / McHenry Avenue Intersection

Relocate intersection of California Street and McHenry Avenue to include realignment of California Street to a new 4-way intersection of California Street, Weiss Way and McHenry Avenue.

McHenry Avenue Widening

Widen from 2 to 4 lanes between Roosevelt Avenue and First Street including relocation of traffic signal at intersection of First Street and McHenry Avenue.

Escalon-Bellota Road

Widen from 2 to 4 lanes between Mariposa Road and Escalon City limit.

Lathrop Planning Area:

Interstate 5 / Louise Avenue Interchange

Reconstruct interchange of I-5 and Louise Avenue.

Interstate 5 / Lathrop Road Interchange

Reconstruct interchange of I-5 and Lathrop Road.

Lodi Planning Area:

Pine Street

Widen from 2 to 3 lanes between Cherokee Lane and Beckman Road.

Victor Road

Widen from 2 to 4 lanes between Cluff Avenue and the eastern General Plan boundary including construction of median as well as capacity, signalization, and safety improvements at Route 99.

Hutchins Street

Widen from 3 to 4 lanes between Kettleman Lane and Lodi Avenue.

Harney Lane

Widen from 2 to 4 lanes between Lower Sacramento Road and Rt. 99 including construction of raised landscaped median.

Ham Lane

Widen from 2 to 4 lanes between Lodi Avenue and Elm Street.

Route 99 / Harney Lane Interchange

Reconstruct interchange of Rt. 99 and Harney Lane.

Route 99 / Turner Road Interchange

Provide capacity, signalization, and safety improvements at the interchange of Rt. 99 and Turner Road.

Turner Road

Widen from 2 to 4 lanes between I-5 and the Lodi City limits

Manteca Planning Area:**Route 120 / McKinley Avenue Interchange**

Construct new interchange at Rt. 120 and McKinley Avenue.

Route 99 / Austin Road Interchange

Reconstruct interchange of Rt. 99 and Austin Road.

Louise Avenue

Improvements (Main to Rt. 99)

Route 120 / Main Street Interchange

Reconstruct interchange of Rt. 120 and Main Street.

Route 120 / Airport Way Interchange

Reconstruct interchange of Rt. 120 and Airport Way.

Route 120 / Union Road Interchange

Reconstruct interchange of Rt. 120 and Union Road.

Airport Way

Widen from 2 to 4 lanes between Lathrop Road and French Camp Road and from 4 to 6 lanes between French Camp Road and Arch Road

Ripon Planning Area:

Stockton Avenue

Widen from 2 to 4 lanes between 2nd Street and 5th Street.

Route 99 / Main Street / UPRR Interchange

Reconstruct interchange of Rt. 99 and Main Street including reconstruction of Main Street overcrossing of UPRR and intersection improvements at Stockton Avenue and East Main Street.

Route 99 / Wilma Avenue / UPRR Interchange

Reconstruct interchange of Rt. 99 and Wilma Avenue including reconstruction of Wilma Avenue overcrossing of UPRR.

Route 99 / Jack Tone Road / UPRR Interchange

Equity adjustment for reconstructing the interchange of Rt. 99 and Jack Tone Road including reconstruction of Jack Tone Road overcrossing of UPRR.

Route 99 / Olive Avenue / UPRR Interchange

Construct new interchange of Rt. 99 and Olive Avenue including construction of an overcrossing of UPRR.

Jack Tone Road

Widen from 2 to 4 lanes between Ripon City limits and Mariposa Road.

Stockton Planning Area:

Pacific Avenue

Widen from 6 to 8 lanes between the Calaveras River and Hammer Lane including reconstruction of intersections, addition of turn and acceleration/deceleration lanes, and reconstruction/extension of a raised landscaped median.

Thornton Road

Widen to 6 lanes between Bear Creek and Hammer Lane including reconstruction of intersections, addition of turn and acceleration/deceleration lanes, and construction of a raised landscaped median.

Eight Mile Road Expressway

Widen to 8 through lanes between I-5 and Rt.99 including reconstruction of intersections, addition of turn and acceleration/deceleration lanes, and construction of a raised median.

Airport Way

Reconstruct intersections, add turn lanes, and install traffic signal improvements between Harding Way and Industrial Drive

Mariposa Road

Widen from 2 to 4 lanes between Rt. 99 and Jack Tone Road.

Interstate 5 Widening and Improvements

Route 99 Widening and Improvements

Tracy Planning Area:

Corral Hollow

Widen from 2 to 4 lanes between Linne Road and Parkside Road including construction of median and sidewalk.

Mac Arthur Drive

Widen from 2 to 4 lanes between Valpico Road and Schulte Road including construction of median and sidewalk. Construct 4 lane extension of Mac Arthur Drive between Monte Diablo Road and Eleventh Street including construction of median and sidewalk.

Grant Line Road

Widen from 2 to 4 lanes between Parker and Mac Arthur Drive including construction of median and sidewalk.

Schulte Road

Construct 4 lane extension of Schulte Road between west of Corral Hollow Road and Lammers Road including construction of median and sidewalk.

Interstate 205 / Lammers Road Interchange

Construct new interchange of I-205 and Lammers Road.

Interstate 205 / Mac Arthur Drive Interchange

Improve ramps at interchange of I-205 and Mac Arthur Drive.

Eleventh Street

Improve roadway between Mac Arthur Drive and I-5 including installation of traffic signal and/or roundabout improvements at intersections, center median, and an eastbound auxiliary lane at selected areas of Eleventh Street corridor.

Linne Road

Widen from 2 to 4 lanes between Tracy Boulevard and Chrisman Road.

LOCAL STREET REPAIRS AND ROADWAY SAFETY

Cities and the County will share thirty-five percent (35%) of the net sales tax revenue for local street repairs, roadway safety and operations improvements as determined by the local jurisdiction. Local jurisdictions will receive an annual funding allocation on a formula basis according to a baseline allocation and the sales tax revenue increase over the baseline allocation. The baseline allocation is the highest annual total of Local Street Repair funding collected in either 2008, 2009, or 2010 divided 50% to San Joaquin County, 50% to the incorporated cities. Individual city allocations are by their proportionate share of the total incorporated population. The baseline allocation will be increased annually for inflation by 3% or the actual annual growth in sales tax revenue if the actual annual sales tax growth rate is below 3%. The increase over baseline allocation will be divided between all jurisdictions by population percentage of the total incorporated and unincorporated population. The County of San Joaquin is guaranteed an annual minimum of 40% of the combined Local Street Repair and Roadway Safety funding. An annual minimum of \$300,000 is guaranteed to all jurisdictions. This formula will be reviewed and, if necessary, revised after fifteen years. These funds must be used to augment current transportation spending and cannot be used to replace general fund expenditures.

Local Street Repair

Local Street Repair includes expenditures to rehabilitate local roadways as determined by the local jurisdiction. It is the intent of the California State Legislature and the Authority that revenues provided under this measure be used to supplement existing revenues being used for local street maintenance projects and programs.

Maintenance of Effort Policy:

- A JURISDICTION CANNOT REDIRECT MONIES CURRENTLY BEING USED FOR LOCAL STREET MAINTENANCE PURPOSES TO OTHER USES, AND THEN REPLACE THE REDIRECTED FUNDS WITH LOCAL STREET MAINTENANCE DOLLARS FROM THE RETAIL TRANSACTION AND USE TAX. To meet the requirements of state law, a jurisdiction must demonstrate maintenance or a minimum level of local street and road expenditures in conformance with procedures adopted in ordinance by the Authority. Monies from this program may not go to a city's or the County's "General Fund".
- The Authority shall annually update the base year and preceding three year base period for the establishment of an annual minimum based on the information available from the State Controller's Annual Report of Financial Transactions for Streets and Roads.
- An annual independent audit will be conducted to verify that the Maintenance of Effort requirements were met by the local jurisdictions. Any local jurisdiction which does not meet its Maintenance of Effort requirement in any given year may have its Local Street Repair funding reduced in the following year by the amount by which the jurisdiction did not meet its required Maintenance of Effort. Such funds shall be redistributed to the remaining eligible jurisdictions.
- A jurisdiction may use monies from this source to offset the loss of traffic fee revenue from exempted "affordable housing units" as defined in the Regional Fair Share Housing Plan.
- Local jurisdictions may "lend" any of their allocation to another agency so that projects could be expedited as long as a formal agreement is executed by all agencies involved and is approved by the Authority.

Roadway Safety

Roadway Safety includes expenditures to promote safety improvements on local roadways as determined by the local jurisdiction. Local jurisdictions will provide an annual report of roadway safety projects completed with Roadway Safety funding as part of the annual independent audit of maintenance of effort for Local Street Repair funding.

Eligible projects that may be funded under this program include, but are not limited to:

- Median barriers and guard rails
- Roadway shoulders
- Traffic signal synchronization
- Acceleration/deceleration lanes
- Emergency vehicle traffic signal pre-emption systems
- Raised fog reflectors
- Turn lanes and pockets
- Safe routes to schools
- Roadway realignments

PASSENGER RAIL, BUS AND BICYCLES

Thirty percent (30%) of the net sales tax revenue generated in the Measure K program will be allocated for passenger rail transit, bus transit, and pedestrian/bicycle projects. The objective of this category is to provide alternatives to the use of automobiles as a means of intercity and commute transportation. This is an important step in improving air quality in addition to enhancing the mobility of persons without access to private automobiles, the elderly, and persons with disabilities of San Joaquin County. It is the intent to use sales tax revenue to match and supplement state and federal funds. All investments in capital items or facilities will be within San Joaquin County or directly service the interests of San Joaquin County residents.

Passenger Rail Transit

Passenger Rail Transit includes expenditures to promote and upgrade commuter rail service provided by the Altamont Commuter Express (ACE) service. This category is intended primarily for capital purchases. Eligible costs include operations. The two primary corridors identified for rail service are:

1. Stockton – Bay Area
2. Modesto – Stockton – Sacramento

Eligible projects that may be funded under this program include, but are not limited to:

- ACE stations
- Track improvements
- Locomotives and rail passenger cars
- Grade crossing controls
- Connections to BART and other transit systems
- Service planning and studies
- Ripon Multimodal Station

Bus Transit

Bus Transit includes interregional/intra-city commute, inter-city, and elderly/persons with disabilities bus service. Inter-city and Elderly/Persons with Disabilities Service promotes both bus service between the cities within San Joaquin County for all trip purposes and specialized elderly/persons with disabilities bus service throughout San Joaquin County. Interregional/Intra-city Commute Service includes bus programs to promote peak hour, commute service. To address needs in the next two funding categories, the Authority shall prepare and update every five years a 20-year Regional Transit Systems Plan to allocate monies from this program to promote the ridership on and the efficiency of peak hour, commute time and intercity bus service. The San Joaquin Regional Transit District is to receive a minimum of 50% of the funds allocated from this program for implementing the projects identified above in conformance with the Regional Transit Systems Plan. Local jurisdiction transit programs are eligible to apply for funding provided that, with the exception of local jurisdictions less than 75,000 in population, the San Joaquin Regional Transit District and the San Joaquin Regional Rail Commission, none of their Transportation Development Act (TDA) local transportation funding (LTF) is claimed or reclaimed under Public Utilities Code, Chapter 4, Article 8, Section 99400a for local streets and roads purposes, excluding pedestrian and bicycle facilities.

An amount equal to 50% of the City of Ripon's and the City of Escalon's share of the transit category based upon population will be made available for transit service to the Modesto area from those communities. Any funds not used by the Cities of Ripon and Escalon will be made available for regional transit purposes.

Interregional/Intra-City Commute Service

These funds are to provide additional peak hour service to foster more commute trip making on transit. Funding would be available for both capital and operations. Funding could go towards any project that promotes the use of alternative transportation during the commute hours and is available to local jurisdictions providing bus transit service. This funding category is to supplement and not to replace funding for existing service, excluding those services funded under the 1990 Measure K program. This program is also available for facilities and the promotion of rideshare alternatives such as carpools, vanpools, and buspools.

Eligible projects that may be funded under this program include, but are not limited to:

- Bus service to employment centers in other counties such as Alameda, Sacramento and Stanislaus.
- Bus service to regional education centers.
- Greater frequencies on existing peak hour intra-city bus routes.
- Express Bus Service on I-5 and Route 99
- Region-wide ride share program
- Park and ride lot locations in San Joaquin County
- Bus Rapid Transit operations

Inter-City and Elderly/Persons with Disabilities Transit

Eligible projects that may be funded under this program in the following priority order include, but are not limited to:

- Inter-city bus service between Stockton and the Cities of Lodi, Manteca, Lathrop, Tracy, Escalon and Ripon for all trip purposes.
- Capital purchases such as vehicles for providing transit service in all communities to the elderly, persons with disabilities, and the transportation disadvantaged.
- Operating expenses for transit service to the elderly, persons with disabilities, and the transportation disadvantaged.
- Bus Rapid Transit operations

Bus Rapid Transit Capital

Bus Rapid Transit provides express bus service with fewer stops and higher frequencies that are similar to light rail. Bus Rapid Transit requires priority to be given to buses through traffic signal priority and could allow buses to run on designated high occupancy roadway lanes or separate lanes, including off roadway corridors. Bus Rapid Transit can include interregional/intra-city commute, inter-city, and elderly/persons with disabilities bus service. Bus Rapid Transit Capital provides funding specifically for infrastructure to support Bus Rapid Transit service. Local jurisdiction transit programs are eligible to apply for funding provided that, with the exception of local jurisdictions less than 75,000 in population, the San Joaquin Regional Transit District and the San Joaquin Regional Rail Commission, none of their Transportation Development Act (TDA) local transportation funding (LTF) is claimed or reclaimed under Public Utilities Code, Chapter 4, Article 8, Section 99400a for local streets and roads purposes, excluding pedestrian and bicycle facilities.

Eligible projects that may be funded under this program include, but are not limited to:

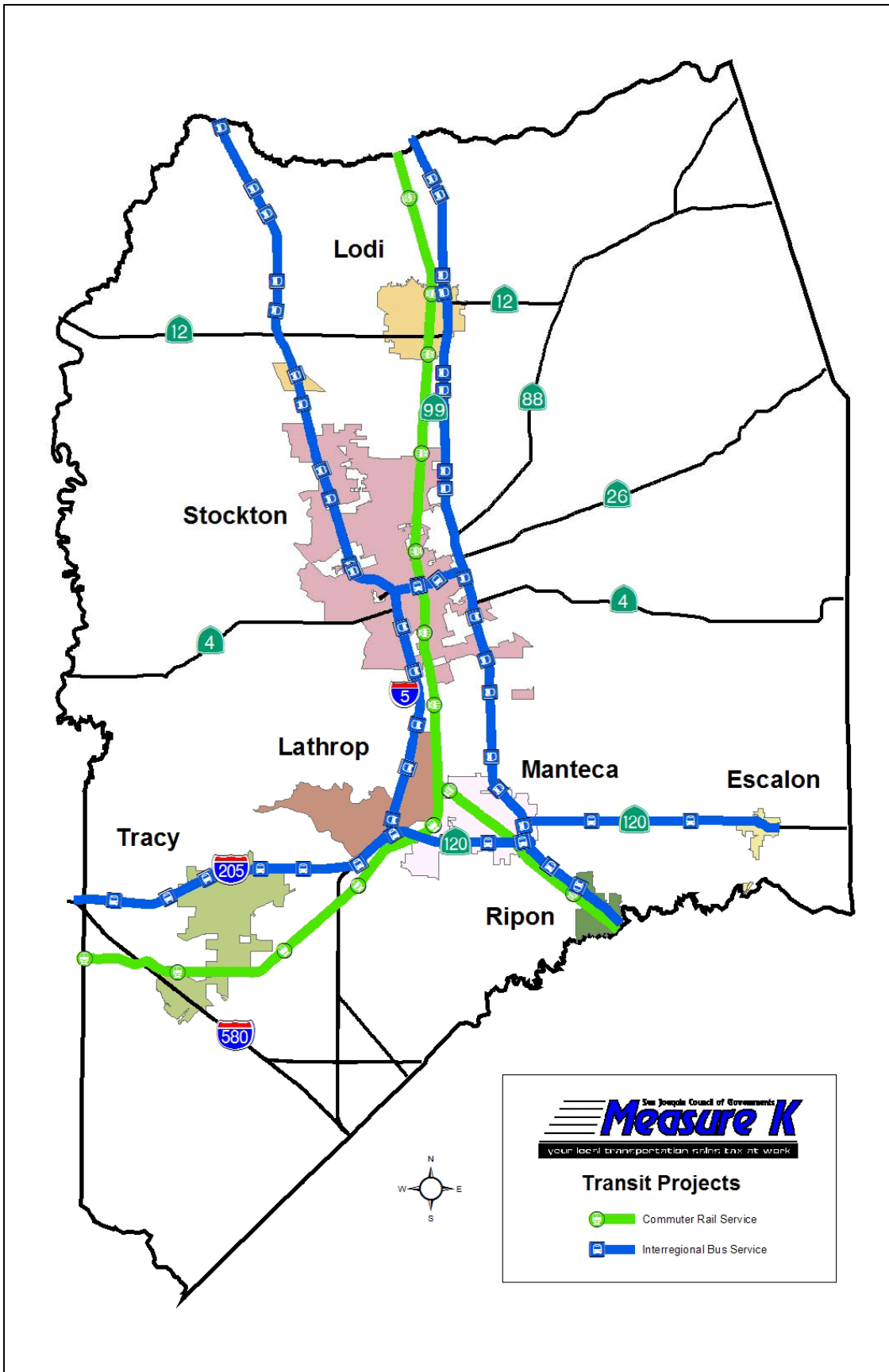
- Dedicated bus lanes
- Stations
- Turnouts
- Fare collection systems
- Traffic signal pre-emption systems for buses

Bicycles, Pedestrians, and Safe Routes to School

These funds are to expand and enhance pedestrian and bicycle safety and facilities within San Joaquin County. These projects may include improving existing pedestrian and bicycle facilities and/or planning, developing, and constructing new facilities. Sixty percent (60%) of the funds will be allocated according to a competitive grant process. Forty percent (40%) of the funds will be allocated to the local jurisdictions according to their proportionate share of the total incorporated and unincorporated population. All local jurisdictions, the San Joaquin Regional Transit District, and the San Joaquin Regional Rail Commission are eligible to apply for the competitive funding. It is intended that these funds be used to match federal, state, local, and private funding to maximize the number of improvements to be implemented.

Eligible projects that may be funded under this program include, but are not limited to:

- Bicycle commute facilities on separate rights-of-way
- Recreational pedestrian and bicycle facilities
- Traffic calming devices
- Cross walks
- Pedestrian/bicycle overcrossings
- Safe routes to schools



RAILROAD CROSSING SAFETY

Two and one-half percent (2.5%) of the net revenue generated under this measure will be allocated to railroad crossing safety projects. Railroad crossing safety projects include grade separation facility projects, meant to separate local roads and streets from railroads, as well as at-grade improvements. Grade separations can be done through the construction of overpasses or underpasses. Funds will be used to match state and local revenues to fund the following list of eligible railroad crossing safety projects. The Authority will adopt criteria to prioritize the listing.

Escalon Planning Area:

Escalon BNSF Crossing

Construct grade separation or at-grade improvements of BNSF railway crossings at location in City of Escalon to be determined through local arterial circulation analysis.

Lathrop Planning Area:

Lathrop Road / UPRR (Westerly)

Construct grade separation of roadway and railway.

Lodi Planning Area:

Harney Lane / UPRR

Construct grade separation of roadway and railway.

Lodi Avenue / UPRR

Construct safety improvements of railway crossing.

Lower Sacramento Road / UPRR (near Woodson Road)

Construct grade separation of roadway and railway.

Davis Road / UPRR

Construct grade separation of roadway and railway.

Turner Road / UPRR

Construct grade separation of roadway and railway.

Manteca Planning Area:

Airport Way / UPRR

Construct at-grade improvements of railway crossing.

Ripon Planning Area:

Route 99 / Main Street / UPRR

Reconstruct overcrossing of railway as part of interchange reconstruction project.

Route 99 / Wilma Road / UPRR

Reconstruct overcrossing of railway as part of interchange reconstruction project.

Stockton Planning Area:

Eight Mile / UPRR (Westerly)

Construct grade separation of roadway and railway.

Eight Mile / UPRR (Easterly)

Construct grade separation of roadway and railway.

Airport Way / BNSF

Construct at-grade improvements of railway crossing.

8th Street / UPRR

Construct grade separation of roadway and railway.

Lower Sacramento Road / UPRR

Construct grade separation of roadway and railway.

Morada Lane / UPRR (Westerly)

Construct grade separation of roadway and railway.

West Lane / UPRR

Construct grade separation of roadway and railway.

Alpine Road / UPRR (Westerly)

Construct grade separation of roadway and railway.

Alpine Road / UPRR (Easterly)

Construct grade separation of roadway and railway.

Tracy Planning Area:

Chrisman Road / UPRR

Construct grade separation of roadway and railway.

ADMINISTRATION

LOCAL TRANSPORTATION AUTHORITY ADMINISTRATION

The Authority will hire the staff and professional assistance required to administer the proceeds of the tax and carry out the mission outlined in this Expenditure Plan.

- The total administrative cost of salaries and benefits of the staff of the Authority shall not exceed one percent (1%) of the gross revenues generated by the measure. These costs include salaries, wages, benefits, overhead, auditing and those services including contractual services necessary to administer this Plan.
- An annual independent audit shall be conducted to assure that the revenues expended by the Authority under this section are necessary and reasonable in carrying out its responsibilities under the Ordinance.
- The Authority will prepare an annual report, identifying the total expenditures for administration, as well as other costs associated with delivering the program.
- An annual budget will be adopted by the Authority each year. The budget will project the expected sales tax receipts, other anticipated funds, and planned expenditures for administration, programs, and projects. The Strategic Plan can serve as the budget.

AUTHORITY COMMITTEES

The following committee structure will advise the Authority in the administration of the Expenditure Plan.

- ***The Management and Finance Committee*** will guide administrative and financial decisions of the Local Transportation Authority and is to be composed of City Managers, the County Administrator, the General Manager of the San Joaquin Regional Transit District, and the Executive Director of the San Joaquin Regional Rail Commission.
- ***The Technical Advisory Committee*** will serve as the Authority's technical advisory committee and be composed of Directors from the area Public Works Departments, Planning Departments, Caltrans District 10, the San Joaquin Regional Transit District, the San Joaquin Regional Rail Commission, the Air Pollution Control District, and any other agency the Authority so names.
- ***The Citizens Review Committee*** will serve to provide community input on project priorities, scheduling, amendments, and any other activity the Authority so designates. The Authority must create a Citizens Review Committee that fairly represents the geographical, social, cultural, and economic mix of the region.

STRATEGIC PLAN

The Authority will prepare a Strategic Plan every two years. The Strategic Plan will be the master document for delivery of the Expenditure Plan projects and can be amended at any time. The purposes of the Strategic Plan are as follows:

- Defines the scope, cost, and schedule of each project
- Identifies accomplishments and critical issues
- Lists a set of amendments to these projects
- Details the revenue projections and possible financing tools needed to deliver the Expenditure Plan
- Gathers into one document the policies and procedures of the Expenditure Plan
- Serve as annual budget

AMENDMENTS TO THE EXPENDITURE PLAN

The Authority may annually review and propose amendments to the Expenditure Plan to provide for the use of additional federal, state and local funds, to account for unexpected revenues, or to take into consideration unforeseen circumstances. The Authority shall act on only one package of amendments per fiscal year. Amendments to the Expenditure Plan must be passed by a two thirds majority of the Authority. The Authority shall notify the Board of Supervisors, the City Council of each city in the county and provide each entity with a copy of the proposed amendment(s). Pursuant to Public Utilities Code 180207, proposed amendment(s) shall become effective 45 days after notice is given, unless appealed under the process outlined in the Ordinance. The Authority shall hold a public hearing on the proposed amendment(s) within this 45 day period.

MANDATORY DEVELOPMENT FEES

All communities in San Joaquin County must have adopted both a local development fee program for traffic mitigation and the Regional Transportation Impact Fee. Should a jurisdiction not have a local traffic impact mitigation fee and the Regional Transportation Impact Fee in place by the last day of the fiscal year, then all revenue apportioned to that community under the Local Street Repair Program will be reapportioned for the following fiscal year among all the eligible jurisdictions based on the adopted formula.

TAXPAYER ACCOUNTABILITY SAFEGUARDS

LEGAL DEDICATION OF FUNDS

Measure K funds may only be used for transportation purposes as described in the local ordinance governing this program, including the construction, environmental mitigation of transportation projects, capital activities, acquisition, maintenance, and operation of streets, roads, highways, including state highways and public transit systems and for related purposes. These purposes include but are not limited to expenditures for the planning, environmental reviews, engineering and design costs, related right-of-way acquisition, and construction, engineering and administration.

MANDATORY ANNUAL FISCAL AUDIT

No less than annually, the Authority shall conduct an independent fiscal audit of the expenditure of all sales tax funds raised by this measure. The audit, which shall be made available to the public, shall report on evidence that the expenditure of funds is in accordance with the San Joaquin County Transportation Improvement Plan as adopted by the voters in approving the sales tax measure on November 2, 2006. In addition, the audit shall determine that Maintenance of Effort requirements and local government participation in both the Regional Transportation Impact Fee Program as well as a local developer fee program for traffic mitigation. The audit shall also insure that no more than one percent (1%) of total sales tax expenditures is used for administrative staff salaries and benefits in implementing this Plan.

MANDATORY PLAN UPDATE AND TERMINATION OF SALES TAX

This Plan shall be updated by the Authority every ten years that the sales tax is in effect to reflect current and changing priorities and needs in the County, as defined by the duly elected local government representatives on the Authority Board. Any changes to this Plan must be adopted in accordance with current law in effect at the time of the update and must be based on findings of necessity for change by the Authority. The sales tax authorized to be collected by the voters shall be terminated on March 31, 2041, unless reauthorized by the voters to extend the sales tax prior to the termination date as required under state law in effect at the time of the vote for extension. For the purpose of this and future sales tax extensions, sales tax collected under this plan may be used to reimburse the Authority for costs associated with drafting a successor plan, conducting a Programmatic Environmental Impact Report, and the election.